CHARACTERISTICS OF THE CANADIAN MOTOR CARRIER INDUSTRY

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Introduction

The purpose of this paper is to outline the size and nature of the motor carrier industry in Canada. Subsequent papers will deal in detail with regulatory and economic aspects of the trucking and inter-city bus industries, and consider them in relation to other transport modes. Published information and statistics on the motor carrier industry are not as readily available nor as accurate as those for the railway or air transport industries, and this paper will therefore attempt to describe briefly the structure of the trucking and bus industries for use as background to the detailed papers which follow.

Size of the Industry

Carriage by motor transport is either private i.e. carriage on own account or public i.e. for-hire. In carriage of both passengers and freight, private transport dominates; the dominance of the automobile in domestic passenger transport is obvious with all other modes of passenger transport competing for 15% of the total market. Similarly, there are over 1.1 million trucks in Canada, of which only 6% belong to for-hire fleets. However, it is important to note that these 6% perform half of the total trucking activity in Canada.

This paper deals only with the characteristics of the for-hire road transport industry i.e. trucking, household goods moving and bus, but it is important to recognise its relationship to private road transport, just as it is to other modes of for-hire transport.

There are about 13,000 for-hire carriers in Canada, 12,000 for freight and 1,000 for passengers. Of this total at least 11,500

have gross annual operating revenues of less than $100,000, which gives an indication of the small firm nature of the industry. DBS estimate that the largest 50 trucking firms account for only 1/3 of total revenues, and that a similar proportion of employed personnel in the industry are in firms with less than 20 employees. This tendency to small companies is confirmed by the fact that there are 18,000 working proprietors in the industry. The bus industry shows a similar predominance of small firms but the proportion of revenues generated by the larger firms is much greater: the Class I carriers (those with gross revenues in excess of $100,000) producing over 90%.

Considering road transport operations in relation to the present regulatory structure, about 2,300 carriers operate extra-provincially, either interprovincially, internationally, or both. This figure includes U.S. carriers operating into Canada; it is obviously not fixed as several operations are carried on permit, particularly bus charters.

Carriers can be divided into those who operate only extra-provincially, those holding extra-provincially rights but also operating intra-provincially, and those who operate only intra-provincially. Very few operators fall into the first group, as most of the general freight operators holding extra-provincial rights also operate intra-provincially. The same is true of bus carriers, where many intra-provincial regular-route operators also conduct out-of-province charters. Because of the nature of their business, most household goods movers are based in the large cities and most hold extra-provincial licences (many of them to all points in Canada). Those that do not hold these rights tend to be small cartage firms specialising in local moving,

or those engaged in moving furniture as an incidental to local delivery service.

The inter-relationships between different types of carriers can be seen from the Vancouver-Calgary corridor. Two-thirds of general freight carriers on this route are extra-provincial, about half of them operating only between the two cities. Of the rest, most extra-provincial carriers serve only the large intermediate points such as Kamloops, Revelstoke and Banff, leaving intra-provincial carriers to serve the small villages. Most communities are served by three or more freight carriers, only the smaller and more remote being served by one. Passenger services are dominated by extra-provincial carriers, with intra-provincial bus companies providing feeder services. Even the sightseeing and tour services tend to be controlled by an extra-provincial carrier.

Characteristics of the Trucking Industry

Trucking accounts for about 55% of total tonnage transported in Canada, and is increasing at a rate of about 5% per annum. In terms of exports to the U.S., trucks carry about one-third. The industry is therefore as important in the Canadian transport scene as railway, shipping and pipelines. However, the growth of trucking has mainly been due to much greater flexibility than any other mode of freight transport; this flexibility however, results in greater complexity.

Long Distance Carriers

In terms of geographical area served, freight carriers can be divided into long-distance, local, regional and international. The best-known long distance carriers in Canada are those that operate trans-continentally from Montreal and Toronto to Winnipeg, Calgary,

Edmonton and Vancouver. This group includes many of the large Class I carriers, and extra-provincial traffic dominates their business. A few transcontinental carriers are 100% extra-provincial; and of those that are not, extra-provincial traffic tends to account for 75%-80% of revenues. The general pattern of operation is a corridor operation e.g. Montreal and/or Toronto-Winnipeg-Regina and/or Saskatoon-Calgary and/or Edmonton-Vancouver but some carriers have much more specialised and direct routings e.g. Vancouver to Toronto, Edmonton to Montreal, the former being characteristic of companies hauling imported products from Vancouver, the latter of companies which began as (and may still be) primarily meat haulers. It is interesting to note the impact of the completion of the Trans-Canada Highway on the development of an all-Canadian transcontinental route. Prior to opening of the Lake Superior and Rogers Pass sections of the highway, traffic from Toronto to the west ran via Chicago, while that from the prairies to Vancouver ran via Spokane.

The eastern haul from Ontario and Quebec to the Atlantic Provinces is a scaled-down version of the western run. For various reasons including the scale of economy of the Atlantic Provinces and the effects of the Maritime Freight Rates Act, the amount of business is less, and has resulted in fewer firms. Those from Quebec to the Maritimes run via the Trans-Canada Highway, but much Ontario to Maritimes traffic runs directly via the Maine salient. Undoubtedly, construction of a Maine Corridor Road would improve road service to sections of the Maritimes.

Because of the narrow population distribution along the southern edge of Canada, and the existence of only a few good paved highways which can take a 70,000 lb. tractor-trailer combination, the long

distance road transport industry can be considered as a series of inter-city corridors. The breakdown of the western transcontinental route into inter-city corridors was noted above, and it is interesting to note that each city on the corridor is the headquarters of at least one large transcontinental freight carrier.

The busiest corridor is that between Quebec City and Windsor, particularly the 346 mile central section between Montreal and Toronto via Highways #401 and #2. Eighteen intra-provincial and 28 extra-provincial carriers of general freight operate on the corridor, some of them closed-door operations as part of service to or from western Canada and the Maritimes. One interesting pattern developed on this corridor is the "in-series" (end to end) services provided by trucking companies in the same group; at least seven groupings can be identified. Similarly, trailer interchange tends to be either with a company's own affiliates or with other major carriers.

Development of piggyback transport of trailers has been slower to develop in Canada than in the United States, partly due to the fact that the piggyback service offered by the railways was not competitive with over-the-road service, and partly due to operational reasons. Thus in the mid-sixties piggybacking was mainly used by the railway-owned trucking companies, for excess loads, or for balancing trailer distribution. However, the development of containerization and higher labour costs for over the road trucking have led to an increase in piggybacking in the last two years. Obviously the long-distance movements are those where piggyback service offers advantages and it is notable that one transcontinental carrier has gone to rail for most of its line-haul service.

Not all long-distance trucking parallels the east-west population belt in Southern Canada. International traffic which is considered later in this paper is important, and there are several important north-south services in Canada, particularly to Northern B.C., the Yukon and Northwest Territories. Regular services operate on the Alaska and MacKenzie Highways, while service to much of Arctic Canada is by trucks and truck trains running over winter roads. Several Edmonton-based companies operate this type of service in the Northwest Territories, and Winnipeg-based companies operate similar services in Northern Manitoba.

Regional Carriers

The second major group of Canadian trucking companies are those which can be considered as regional carriers. Because road transport developed after the establishment of the provincial boundaries, and most Canadian provinces have distinctive geomorphic and economic characteristics, the regional carriers have unique characteristics.

In British Columbia several regional carriers provide daily distribution from Vancouver to the interior valleys and, via the British Columbia ferry system to Vancouver Island and coastal points. One example of the former is a firm based in Vancouver which runs a series of routes from Vancouver to Harrison Hot Springs, to Williams Lake, and to Nelson, while another based in the interior of the province serves points in the Cariboo and the Okanagan Valley. Only about half the extra-provincial carriers operating out of Vancouver carry out intra-provincial business in British Columbia, which leaves a large share of the market for regional carriers in that province.

In Alberta, by contrast, most of the large extra-provincial carriers serve the larger intermediate points on their routes. All

inter-city service between Calgary and Edmonton, and all service to Red Deer is provided by intra-provincial carriers. (44 general freight carriers serve this route, 27 of whom are extra-provincial.) The seventeen intra-provincial carriers all serve smaller towns and villages out of Calgary, Edmonton and Red Deer. The contrast between the role of the large trucking company providing intra-provincial service in B.C. and Alberta is due in large measure to the different regulatory practices in the two provinces. Away from the main highways, the regional carriers do not have to face such severe competitior from the large companies and a number of distinctive operations can be found in eastern and southern Alberta. Sixteen such carriers use a common distribution terminal in Calgary.

Despite the extensive railway network of the prairies a large number of intra-provincial regional carriers serve the small towns of Saskatchewan and Manitoba, from Regina, Saskatoon and Winnipeg. Superimposed upon this pattern are a number of extra-provincial general freight firms which use Winnipeg as a distribution point for Saskatchewan, offering daily service, for example, Winnipeg-Regina-Saskatoon-Prince Albert-Melfort-Tisdale, then returning direct to Winnipeg. Winnipeg is traditionally the collection/distribution point for the prairies and although this prime function has lessened somewhat in recent years it is still true for Manitoba: almost all regional carriers in the province operate out of the capital and there are seven common-user truck terminals in the city.

Because the population and industrial activity in Central Canada is greater than elsewhere, so the regional carriers tend to be larger, but they are nevertheless a distinctive group. Firms in Ontario, for example serve the northwest (out of Thunder Bay), the southwest (out of Toronto) and eastern Ontario (out of Montreal). A high proportion

of Ontario regional carriers are extra-provincial, particularly in the northwest (to Winnipeg), the northeast (to Abitibi) and eastern Ontario (to and from Montreal).

The dominance of Montreal in the distribution pattern of Quebec is similar to that of Winnipeg in Manitoba with a truck route network radiating out from the metropolis. As in Ontario, those regional carriers serving prosperous regions of the province tend to be large companies e.g. those operating to the northwest, Lac St. Jean and Eastern Townships regions.

Just as the national carriers share the regional traffic in Western Canada with a number of locally-based regional carriers, so the Atlantic Provinces are served by a combination of large carriers linking the Maritimes with Montreal and Toronto, and a few carriers who operate intra-regionally. It is important to note that a large proportion of general freight carriers in the Maritimes are extra-provincial due to the relatively small size of the member provinces, the existence of the Maine salient and the importance of traffic along the eastern seaboard to and from the U.S.

Local Cartage Carriers

Local cartage carriers constitute the third important group in the trucking industry. Most local carriers are intra-provincial working in only one city and its surrounding hinterland. A national chain of cartage operators such as those found in U.S. and U.K. has not developed in Canada. However, because a large proportion of trucking activity is in the cities, this group is an important sector of the industry. For example, one Canadian cartage operation requires over 500 trucks, tractors and trailers. Some urban cartage carriers are so large they have subsidiary companies for extra-provincial general

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freight and household goods traffic. On the other hand most large trucking companies have extensive local distribution and collection activities in the cities. As one would expect, the number of companies engaging in local cartage of general freight is in proportion to the size of the city e.g. there are 192 suburban Toronto carriers, 95 of whom are strictly local, the other 97 being inter-city carriers. Several large cities license urban truck operations within their jurisdictions.

International Carriers

The last major group of trucking companies are those operating internationally to and from the U.S. There are very few general freight carriers specializing in international traffic, most international routes being extensions of inter-city operations in Canada or the U.S.

The Montreal-New York corridor and associated service to the north-eastern U.S. is dominated by Canadian carriers, but it is the exception. Elsewhere, numbers of U.S. carriers coming into Canada tend to be greater than those of Canadian carriers operating across the same bridge point. This is particularly true in western Canada, where Vancouver is close to the U.S. border, and movements of U.S. carriers on permit into Alberta is relatively easy.

Several Canadian carriers complement larger parent systems south of the border e.g. Consolidated Freightways (U.S.) - Canadian Freightways (Western Canada) - Canadian Freightways Eastern (Ontario). At the same time several Canadian carriers have working arrangements with U.S. carriers e.g. Smith Transport (Canada) - Smith Transport (U.S.). A third group of companies operate 'bridge' services at Windsor/Detroit and Buffalo. It is also notable that several large U.S. carriers have off-line offices in major Canadian cities e.g.

Pacific Intermountain Express; Pilot Freight Carriers Inc. and other carriers operate in-bond across the salient "bridges" e.g. Maine, Southern Ontario, Michigan.

The above has described and taken examples from the general freight industry. Many such carriers have specialised equipment which permits them to undertake a wide variety of work. However, a large segment of the trucking industry consists of specialized carriers of a wide range of products : household goods, farm requirements, heavy equipment, milk, boats, oil, products requiring refrigeration, gravel, fruit and vegetables, mobile homes, cars, horses and so on. It is not possible in this short paper to describe all the activities of specialised carriers, but the important roles of the household goods movers, the bulk haulers and the dump truck operators are outlined below.

Household Goods Movers

Increasing mobility of the Canadian has increased the business of the household goods mover. Because provincial boundaries mean little in terms of personal and family movements, most household goods movers hold extra-provincial rights. The main exceptions are movers specializing in local moving, a group which corresponds with the local cartage companies in general freight transport. Most movers belong to one of the van line groups to facilitate economic operation by reducing empty backhauls.

Bulk Carriers

Several moving companies are subsidiaries of national general freight companies. Similarly operation of tank trucks for bulk haulage is considered by some to be one aspect of general freight haulage. However, there are many companies which specialize in haulage of bulk products: milk, oil, potash, grain, liquid acids,

anhydrous ammonia, liquified petroleum gases, wine, liquid putty, lime, liquid asphalt, powdered limestone etc. Some companies are licensed to haul many products, others for only one; the designations of national, regional and local also apply in this branch of the industry, and an additional group is the line-haul operator who hauls from point of origin (e.g. a mine) to a fixed destination, such as a chemical plant.

Dump Trucks

The dump truck operators are in many ways the orphans of the trucking industry. Most trucks tend to be owner-operated and thus the dump truckers do not have strong national or provincial representation which is characteristic of, for example, the movers. The size and prosperity of the dump trucking industry is directly related to prevailing economic conditions in the construction industry.

Ownership characteristics of the Canadian trucking industry is a subject for greater research and study and is not discussed in detail in this paper. It should be noted however that takeovers of trucking firms by other modes have created some of the operating characteristics described above. For example, the existence of bridge carriers at international gateways is partly due to the Interstate Commerce Commission regulations on ownership of truck lines by other modes. Several large and regional trucking companies are owned by railways and railway controlled holding companies e.g. Canadian National, Canadian Pacific, Ontario Northland. The trend to inter-modal transportation companies shows also in the small number of trucking companies that are owned by airlines and shipping companies.

<u>Associations</u>

The trucking industry is organized into a number of associations which promote and further the interests of its members. There are seven provincial associations in Canada and a national association. The Canadian Trucking Association in Ottawa was, until recently, the national representative of the provincial associations, however, the larger trucking companies are now permitted and being encouraged to become direct members of CTA. Each of the Western and Central provinces has a separate provincial association, and the Atlantic Provinces Motor Transport Association completes the register. Membership in the Associations varies from province to province, but it is probably true to say that in general they are representative of the larger general freight and specialized haulers. Some specialist carriers have their own organizations e.g. movers and dump truck operators. In addition many Canadian truckers are members of the various regional tariff bureaus established to assist their member companies in rate making.

The development of secondary manfacturing, the decentralization of industry, the growth of large urban areas, improvements of the highway network and improved truck design should all contribute to the continued expansion of the trucking industry. DBS estimates this growth at between 2% and 5% depending on the criterion measured e.g. in terms of tonnage carried it is closer to 5% whereas the increase in numbers of carriers is smaller due to mergers, and entry control regulation. However, this growth will probably be irregular as in the past. When rail strikes occur, for example, the flexibility of the trucking industry permits rapid adaptation to a short-term change in traffic offering, much of which it keeps when the strike is over.

Characteristics of the Bus Industry

The part of the Canadian public road passenger transport industry described in this section of the paper is that which provides inter-city and rural regular-route and charter bus service. School bus and urban transit operations are excluded.

There are about 850 bus companies operating in Canada, half of whom hold certificates for extra-provincial operation. However, numbers do not mean much in the bus industry as a carrier which holds an intra-provincial regular route certificate may have extra-provincial charter rights, or alternatively may operate extra-provincially using trip permits where required. Many provinces permit charters to operate freely as long as there is no pick-up or set down within the borders of the province.

The contrast between large regional and small carriers is clearly marked in the bus industry. There is only one national carrier, but several of the 'regional' carriers are large companies. Because the bus business grew up after provincial boundaries were established, and because most provinces have practised what is virtually monopoly franchise regulatory policies, each province is dominated by a small number of such large regional carriers. About 800 small carriers, many of them one-route family businesses provide the links from and to the big companies on the trunk routes to the smaller rural communities. Often the regular-route passenger services of the small firms are unprofitable but necessary public service to a few people, while the charter and tour traffic and package express business provide the major revenues to the operator.

Because many bus companies are family concerns and small businesses, the ownership aspects of the industry are not so complex

as in the trucking industry. Several companies are (or are subsidiaries of) provincial Crown Corporations e.g. in British Columbia, Saskatchewan and Ontario, while Canadian National operates the Expedo trans-island bus service in Newfoundland. The latter is a rare example of a railway operating the bus service which replaced an uneconomic passenger train, normally, where replacement buses are required as a condition of passenger train abandonment, they are provided by the local bus company chartering to the railway company e.g. Amherst-Charlottetown; Fredericton-McGivney.

Some buses are owned by large diversified financial holding companies, for example in Alberta, New Brunswick and British Columbia. The Greyhound organization is, of course, one such group. Other companies are subsidiaries of shipping companies and transit bus systems.

The following description relates mainly to the regular-route activities of Canadian bus companies. However, the importance of the charter and package express aspects of bus business and the activities of U.S. carriers must also be identified. Charters and package express have had a direct effect on the level of scheduled service that can be offered and on improved bus design. Charter rights are usually granted to a company from the cities, towns and villages that are served by its scheduled service. Package tours and regular service to major sports activities are other services provided by bus companies.

The package express side of bus business has grown up in recent years as both postal and rail parcel services have declined and the need for guaranteed arrival for parcels has been exploited by the

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bus carriers. In many cases, even among large bus companies, the package express revenues turn what would otherwise be a marginal economic activity into a thriving business. Bus express has also changed the characteristics of some retail and service activities on small towns, eliminating the need for maintaining large inventories e.g. of spare parts for autos and electrical equipment. The proportion of company revenues attributable to package express is higher in Western Canada (c. 12 1/2%) than elsewhere in the country (c. 5%).

Buses from U.S. inter-city fleets are most commonly seen in Canada on charters and package express work. However, some regular route services into Canada are operated by U.S. companies. Services into Vancouver, Winnipeg and Montreal are operated by U.S. Divisions of the Greyhound Lines Inc., and other U.S. carriers are operating into Canada for short distances in several provinces. Balancing these border operations are a number of Canadian bus companies which operate for short distances into the U.S. at bridge points e.g. Niagara Falls and Sarnia, a Vancouver-based carrier operating to Seattle as a feeder to the Trailways Bus System, and several carriers operating in pools to U.S. cities.

Pool services are provided in many parts of Canada. Such arrangements usually consist of end-to-end linkage of routes to provide through inter-city and consequently better service to travellers. There are savings to the operators in terms of numbers of vehicles required and reduced dead-heading or lay-over time. Examples of pool services in Canada are Montreal-North Bay-Vancouver; Toronto-Sudbury-Vancouver; Vancouver-B.C. ferries-Victoria/Nanaimo; Regina-Alsask-Calgary; Winnipeg-Thunder Bay-Hearst-North Bay; Toronto-

Montreal-Edmundston-Amherst. Other pool services link Canadian and U.S. cities e.g. Ottawa-Syracuse-Washington; Montreal-Toronto-Detroit-Chicago; Toronto-Buffalo-New York.

As noted above, most large bus companies can be identified with one province, although their regular-route operations may take them into a neighbouring province and their charter services geographically widespread. The only major exception to this generalization is Greyhound Lines of Canada Ltd. which together with its subsidiaries operates from Vancouver to North Bay, Detroit to Buffalo and Toronto, and sightseeing services in the Rockies. When the takeover of the Coachways System is consummated later this year, Greyhound's territory will be extended to Northern British Columbia, the Territories and Alaska, and the company will control most inter-city service in Western Canada and have a virtual monopoly of non-urban bus services in Alberta.

In addition to Greyhound each of the Western Provinces has at least one other large carrier providing regional services. Two of these are Crown Corporations: the Saskatchewan Transportation Company and Pacific Stage Lines. The former has a network of inter-urban routes in Saskatchewan based on Regina, Saskatoon and Prince Albert, and which is complemented by twenty small carriers feeding into its network. Pacific Stage Lines is the outer suburban bus subsidiary of B.C. Hydro and operates in the Greater Vancouver-Lower Mainland region of British Columbia. A subsidiary of International Utilities Corporation, Vancouver Island Coach Lines provides most of the services on Vancouver Island, plus pool services linking the island by bus to Vancouver. In all there are 93 bus operators in British Columbia, two-thirds of whom are intra-provincial. Many of

the latter are small carriers serving the interior valleys of the province.

Two regional carriers are based in Manitoba, one (Grey Goose) with a network of outer suburban and rural routes and the other (Manitoba Motor Transit) having a network of routes in the western part of the province, based on Brandon. Because of the existence of three large carriers there are correspondingly fewer small carriers (eight in total) providing scheduled service in Manitoba.

As was found in the trucking industry, the scale of bus operations in Ontario and Quebec is larger than elsewhere in Canada. Large regional companies are based in Toronto, Hamilton, London, Ottawa, Montreal and Quebec City, and many companies with relatively small regular route operations offer extensive charter services. However the role of the small operator is still important, e.g. out of 537 operators certificated in Ontario 316 are listed as intra-provincial. The small operators services can be easily identified in the rural north of Ontario and Quebec but perform an equally significant role in providing feeder services in the more densely populated areas of the Lakes and St. Lawrence Basin. Two large Ontario carriers are subsidiaries of city transit systems: Gray Coach Lines (Toronto) and Canada Coach Lines (Hamilton) and thus in addition to inter-city service they also operate several regular-interval outer suburban routes. Inter-city services in Eastern Ontario and much of Quebec are provided by the subsidiaries of Provincial Transport Enterprises Ltd.: Voyageur Colonial (Ottawa), Voyageur Abitibi (Val d'Or), Voyageur Provincial (Montreal), and Voyageur Quebec (Quebec City). Until 1967 Provincial Transport also owned a number of suburban companies operating out of Montreal, however

these were sold off and the group now concentrates on providing inter-city services.

The bus systems of each of the Atlantic Provinces are similar in that one company dominates each province. Indeed Prince Edward Island has only one company - Island Motor Transport Ltd. IMT is a subsidiary of the largest bus company in New Brunswick: SMT (Eastern Ltd.), which in turn is a member of the Irving Group. SMT and IMT together provide all of the inter-city service in these two provinces and, with pooling arrangements, link the Maritimes to Central Canada and North-East U.S.A. e.g. Amherst-Edmundston -Quebec-Toronto; Charlottetown-Saint John-New York. Most other bus operators in New Brunswick are small carriers providing radial services from the large towns. Small carriers are also characteristic of Nova Scotia, 48 such operators supplement the inter-city services of Acadian Lines Ltd. and four regional carriers. The peninsular nature of Nova Scotia is reflected in the fact that there are no regular route extra-provincial carriers based in the province; the "links" are provided by SMT's services into Amherst and ferries to Newfoundland, Prince Edward Island, Saint John, N.B. and Maine.

Until the closure of the trans-island railway passenger service in 1969 there were no large bus operators in Newfoundland, the bus industry consisting of a group of outer-suburban carriers operating out of St. Johns to points in the south east of the island, a group of more expensive regular frequency taxi services in the same region, and a few disconnected small rural bus companies elsewhere. Consequently, there was no bus company capable of filling the void of the railway service, and as a condition of closure of the latter,

Canadian National established the Expedo bus service from Port-aux-Basques to St. Johns on the Trans-Canada Highway. This service is some eight hours faster than the Caribou train which it replaced. Since the establishment of the CN buses, some of the smaller carriers have reorganized their services to act as feeders to the "main line".

The bus industry is represented nationally by the Canadian Motor Coach Association, an organization representing the larger companies, all of whom are extra-provincial and most of whom hold inter-provincial or international regular route licenses. At the provincial level the industry has three associations: the Quebec, Ontario and Western Canada Motor Coach Associations.

In the 'sixties the bus industry has gone through a prosperous stage in its development, with influx of new capital into several large companies or groups of companies, internal reorganizations to remove uneconomic segments or rates, and clear identification of the roles of the inter-city, regional and small carriers. Expo'67 also provided a stimulus, particularly to the charter business in Central Canada, but also to some regular route services within 500 miles of Montreal. Like the trucking industry the bus industry will continue to grow. This growth will be greatest on the inter-city routes, both between large cities, and linking the latter to growing inter-mediate-sized cities e.g. Ottawa-(Kingston)-Toronto. There is no doubt that the proposed construction of new highways, improvement of existing highways, the possible rationalization of certain rail passenger train services will all stimulate bus traffic where they occur e.g. Calgary-Edmonton; Montreal to the Clay Belt, but in some areas the existing bus service is probably adequate to cope with any increase in traffic e.g. Halifax to Yarmouth.

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Additional References

It is not possible to cover all aspects of the Canadian motor carrier industry in such a short space as provided in this paper, and apologies are rendered to any sectors of the industry which have not been mentioned but which the reader feels are equally or more significant than those mentioned above. The paper should be looked upon as one of a series, complementing those which follow. The contents are based upon the following publications:

1. D.B.S. Trucking in Canada 1957-67 (DBS 1969)
2. D.B.S. Official Reports on the Bus, Truck & Moving Industries
3. Department of Transport Analysis of Road Transport on the Inter-City Corridors of Canada (1968)
4. Department of Transport Extra-Provincial Motor Carriers of Freight (1968)
5. Department of Transport The Inter-City Bus Industry in Canada (1969)
6. Provincial Trucking Associations Directories of Carriers (1969).

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